

LETTER OF INTENT

United Way of Portage County



To ensure **United Way of Portage County, Inc.** can provide funding to serve the most current, critical needs of our community's most vulnerable populations with programs that provide measurable results now and into the future, I/we intend to include the **United Way Endowment** in my/our estate plan. I/we acknowledge my/our strong belief and confidence in United Way with a qualifying commitment as indicated below:

- I/We have made a provision for the **United Way Endowment of United Way of Portage County, Inc.** in my/our will (or other financial estate planning document).
- I/We will include **United Way Endowment of United Way of Portage County, Inc.** in my/our will or other financial estate planning document and will notify you when my/our plans are completed.

I METHOD

I/We plan to make a provision for the **United Way Endowment** as indicated below:

(Check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Outright Cash Gift | <input type="checkbox"/> Qualified Charitable Distribution (QCDs) |
| <input type="checkbox"/> Bequest in Will/Trust | <input type="checkbox"/> Beneficiary Designation (i.e. IRA, 401(k), Donor Advised Fund) |
| <input type="checkbox"/> Gift of Appreciated Securities | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Gift of Property | <input type="checkbox"/> Life Income Gift (i.e. charitable remainder of trust annually) |
| <input type="checkbox"/> Other, Please Specify: _____ | |

II ESTIMATED GIFT AMOUNT

- \$ Other:

*Please note that including a gift amount is optional; however, it will help United Way to better plan for the future.

III RECOGNITION

- I/we hope to inspire others to consider a gift to the **United Way Endowment**. Please acknowledge my/our Letter of Intent with other generous donors in recognition materials.
- I/we prefer to remain anonymous.

IV CONTACT INFORMATION (NAME AS YOU WOULD LIKE IT TO APPEAR IN RECOGNITION)

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

SIGNATURE(S)

____/____/____

DATE

*Although this Letter of Intent is not a legal obligation and may be changed by either party at any time, it has been made in good faith as a commitment to the **United Way of Portage County, Inc.**

Note: United Way of Portage County, Inc. is a 501(c)(3) organization with Federal Id # 39-0831152. Be sure to include **"United Way Endowment of United Way of Portage County, Inc."** with any designations.

FOR MORE INFORMATION CONTACT:

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